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## **Poland**

### **Poultry and Products**

#### **Annual**

#### **2001**

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#### **Report Highlights:**

**In 2001 and 2002, poultry meat production in Poland is expected to increase due to a strong consumer demand resulting from the concerns with beef and substitution of pork in sausages. Imports of poultry meat from the U.S. increased by 24 percent in 2000. However, Poland's introduction of a zero tariff rate quota of 21,000 tons for the EU may adversely affect U.S. exports in 2001 and 2002.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
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## I. Situation and Outlook

In 2001, poultry meat production is expected to increase to meet strong consumer demand partially a result of the concerns with beef. Most of the increase will occur in chicken broilers and turkey meat production. Output is expected to continue to grow in 2002 as profitability improves with declining input costs. Feed costs are expected to decrease during the second half of 2001 and the first six months of 2002 due to a 15-percent increase in the domestic grain crop for the year. It is expected that increase of prices for pork in the last quarter of 2001 and first half of 2002 will stimulate substitution of pork by poultry meat.

In 2000, over 90 percent of Poland's poultry was produced in large commercial facilities. The remainder came from smaller, less intensive household flocks. Of the poultry produced on commercial farms, 74 percent were chicken broilers, 22 percent was turkey and 3 percent was water fowl (geese and ducks) . Turkey is primarily used for further processing while ducks and geese are normally exported to the European Union (EU).

Most of the large poultry slaughterhouses maintain facilities for further processing of poultry meat for sausages and smoked products. In 2000, production of processed poultry products was 150,000 tons, up from 140,000 tons in 1999. Almost 71 percent of the domestic broiler production is processed by 30 large slaughterhouses. Most large slaughterhouses have their own distribution systems, and sell directly to retail outlets or supermarkets rather than wholesalers.

Turkey meat production is expected to continue to grow in 2000. Most of the turkey meat produced in Poland is processed and turkey is often used in place of pork in sausages. Compared with other meats, there is no tradition of fresh turkey meat consumption. However, consumption has begun to increase as prices of fresh and frozen turkey (imported) become more competitive and as Poles perceive it as a healthier product.

Consumption of chicken and turkey meat continue to grow as Poles become more health conscious and substitute poultry for other meats such as beef or pork. The growing number of fast food restaurants has stimulated demand for poultry meat. Other factors which are promoting poultry consumption include relatively lower prices of poultry meat compared with red meats. In 2000, the average per capita consumption of poultry meat amounted to 14.3 kilograms - a slight increase from 13.9 kilograms in 1999.

Poland's foreign trade balance of poultry meat in 2000 was positive and amounted to \$77.2 million. In 2000, exports of poultry meat and products to the EU increased by 3,500 tons which did not compensate for the decrease in sales to the Eastern Europe markets. Shipments of poultry meat to the EU amounted to 68 percent of total exports. Goose meat and offal are the major Polish export items (44 percent of total exports of poultry meat), followed by turkey meat (20 percent) and chicken meat (16 percent).

Total 2000 imports of poultry meat decreased by 2 percent because of higher domestic production and veterinary ban for imports of MDM for processing into sausages which are primarily exported to Russia. Imports of poultry meat from the United States increased by 24 percent in 2000. The increase in imports from the U.S. reflected higher overall demand for frozen turkey for processing as well as chicken leg quarters for the fast-food sector. In 2000, GOV reduced tariff preferences for poultry meat imported from Hungary which caused a decrease of imports from this country and allowed for higher imports from the U.S. As a part of the Poland - EU accession agreement, Poland established in March 2001 a 21,000 ton import quota for poultry meat from the EU. Within quota tariff for the EU is 0 percent. Elimination of tariff for the EU and relatively low exchange rate of Euro to Polish zloty may result in a significant increase of imports of poultry meat from the EU at the expense of imports from the U.S. and Canada in 2001 and 2002.

All poultry meat imported into Poland must be accompanied by a health certificate issued by a government-approved veterinarian from the exporting country. For products sold in Poland and stored in the country for transshipment in addition suppliers must also meet Poland's standards for storage conditions of poultry meat and validity of the products depending on conditions and temperature of storage. (See Gain Report #1002 on Polish Norms). Each box containing poultry meat must be labeled in Polish and should include the date of production expressed in numbers (not as a bar code), along with the name of the producer and the product's name.

In 2001, the import quota for poultry meat is 47,736 tons compared with 43,512 tons in 2000. The within quota tariff rate is 30 percent (min. 0.3 EUR/kg) while the above quota tariff rate is 60 percent (min. 0.6 EUR/kg). In 2000, only 31 percent of the quota was utilized. Poland remains an important transshipment point for U.S. poultry meat to Ukraine and other parts of the FSU.

To qualify for the within quota tariff rate, importers of poultry meat must obtain a permit from the Ministry of Agriculture for each contract. Multiple permits are often required as the Ministry of Agriculture issues permits for a maximum of 100 MT at one time. After documenting that the product has been sold, the importer may apply for another permit. Traders complain that this procedure is a major obstacle in importing poultry meat.

Maintaining the U.S. share of the Polish market will increasingly depend on U.S. promotional activities stressing product quality in the face of rules such as smaller permit levels which seemed designed to protect Polish poultry production. Apart from sales to importing firms, there is also an opportunity for direct sales to processors interested in joint ventures or poultry meat to be processed and re-exported to Russia or Ukraine. USDA export credit guarantee programs (GSM-102 and Supplier Credit) are available to support sales of U.S. poultry meat to Poland.

Poland is self sufficient in eggs although it does import some hatching eggs. Sixty percent of the eggs are produced in commercial facilities. Since the last quarter of 1999, egg production has been profitable and domestic production has expanded. Egg production in 2001 is expected to increase two percent, and another one percent next year, in response to lower feed prices and improved profitability. It is expected that consumption of eggs will grow in 2001 and 2002 as prices for eggs remain stable while meat prices grow due to shortages. In 2000, Poland's imports of eggs were estimated at 69 million pieces, down 18 percent from the 1999 figure. Imports are expected to remain at this year's level in 2001 due to a stable demand for hatching eggs.

*Other reports of interest:*

- Gain Report #1002 "Polish Norms"
- Gain Report #1022 "Livestock and Products"
- Gain Report #0037 "Dairy Annual"
- Gain Report #1014 "Annual Grain&Feed"

## II. Statistical Tables

PSD, Poultry, Meat, Total

PSD Table						
Country	Poland			x		
Commodity	Poultry, Meat, Total				(1000 MT)(MIL HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	10	10	10	10	10	19
Production	580	580	550	620	0	630
Whole, Imports	0	0	0	0	0	0
Parts, Imports	17	13	20	14	0	15
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	17	13	20	14	0	15
TOTAL SUPPLY	607	603	580	644	10	664
Whole, Exports	0	1	0	0	0	0
Parts, Exports	45	32	40	35	0	40
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	45	33	40	35	0	40
Human Consumption	552	560	530	590	0	600
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	552	560	530	590	0	600
TOTAL Use	597	593	570	625	0	640
Ending Stocks	10	10	10	19	0	24
TOTAL DISTRIBUTION	607	603	580	644	0	664
Calendar Yr. Imp. from U.S.	7	8	8	7	0	6

## Import Trade Matrix , Poultry Meat, Total

Import Trade Matrix			
Country	Poland		

Commodity	Poultry, Meat, Total		
Time period	Jan-Dec	Units:	tons
Imports for:	1999		2000
U.S.	6505	U.S.	8042
Others		Others	
Canada	1084	Canada	1240
The Netherlands	1385	The Netherlands	862
Hungary	3704	Hungary	838
France	582	France	683
Great Britain	98	Great Britain	696
Denmark	85	Denmark	340
Italy	80	Italy	322
Belgium	17	Belgium	117
Germany	40	Germany	184
Ukraine	0	Ukraine	49
Total for Others	7075		5331
Others not Listed	153		40
Grand Total	13733		13413

## Export Trade Matrix , Poultry Meat, Total

Export Trade Matrix			
Country	Poland		

Commodity	Poultry, Meat, Total		
Time period	Jan-Dec	Units:	tons
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	19291	Germany	20188
Russia	13347	Russia	3147
France	2521	France	2754
Belarus	1608	Belarus	1245
Ukraine	1298	Ukraine	787
Hong Kong	0	Hong Kong	994
China	0	China	759
Italy	425	Italy	1221
Great Britain	496	Great Britain	270
Hungary	259	Hungary	217
Total for Others	39245		31582
Others not Listed	4710		1373
Grand Total	43955		32955

## Producers Price of Chicken Broilers

Prices Table			
Country	Poland		

Commodity	Poultry, Meat, Total		
Prices in	zlotys	per uom	kilogram of live weight
Year	2000	2001	% Change
Jan	2.99	3.42	14.38%
Feb	3	3.48	16.00%
Mar	3.08	3.47	12.66%
Apr	3.11	3.48	11.90%
May	3.2	3.45	7.81%
Jun	3.31		
Jul	3.41		
Aug	3.44		
Sep	3.37		
Oct	3.35		
Nov	3.3		
Dec	3.37		
Exchange Rate	4.2	Local currency/US \$	

PSD, Poultry, Meat, Chicken - 16 weeks

PSD Table						
Country	Poland					

Commodity	Plty, Meat, Chicken -16 wks				(1000 MT)(MIL HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	10	5	10	6	10	7
Production	370	370	355	400	0	420
Whole, Imports	0	0	0	0	0	0
Parts, Imports	11	8	13	8	0	7
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	11	8	13	8	0	7
TOTAL SUPPLY	391	383	378	414	10	434
Whole, Exports	0	0	0	1	0	1
Parts, Exports	13	7	11	6	0	7
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	13	7	11	7	0	8
Human Consumption	368	370	357	400	0	415
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	368	370	357	400	0	415
TOTAL Use	381	377	368	407	0	423
Ending Stocks	10	6	10	7	0	11
TOTAL DISTRIBUTION	391	383	378	414	0	434
Calendar Yr. Imp. from U.S.	5	6	5	6	0	7

## Import Trade Matrix, Chicken - 16 weeks

Import Trade Matrix			
Country	Poland		

Commodity	Ppty, Meat, Chicken -16 wks		
Time period	Jan-Dec	Units:	Tons
Imports for:	1999		2000
U.S.	5365	U.S.	6212
Others		Others	
Hungary	1401	Hungary	187
The Netherlands	1322	The Netherlands	707
Denmark	576	Denmark	320
Canada	209	Canada	25
Estonia	42	Italy	12
Russia	20	Germany	43
Iceland	20	Ukraine	49
Belarus	19	France	23
Ukraine	10	Belgium	17
Belgium	3	Dzibuti	20
Total for Others	3622		1403
Others not Listed	1		0
Grand Total	8988		7615

## Export Trade Matrix, Chicken - 16 weeks

Export Trade Matrix			
Country	Poland		

Commodity	Pty, Meat, Chicken -16 wks		
Time period	Jan - Dec	Units:	Tons
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Russia	3617	Russia	756
Germany	3414	Germany	2701
France	1688	France	1936
Ukraine	1106	Ukraine	725
Moldavia	799	Moldavia	38
Byelarus	438	Byelarus	14
Great Britain	308	Great Britain	52
Azerbaijan	0	Azerbaijan	660
Hungary	259	Hungary	217
Romania	0	Romania	139
Total for Others	11629		7238
Others not Listed	1449		100
Grand Total	13078		7338

Retail Price of Chicken Broilers

Prices Table			
Country	Poland		

Commodity	Plty, Meat, Chicken -16 wks		
Prices in	zlotys	per uom	kilogram of dressed chicken
Year	2000	2001	% Change
Jan	5.02	6.64	32.27%
Feb	5.09	6.28	23.38%
Mar	5.34	6	12.36%
Apr	5.6	6.06	8.21%
May	6.14	6.02	-1.95%
Jun	6.3		
Jul	6.32		
Aug	6.25		
Sep	6		
Oct	5.63		
Nov	5.53		
Dec	5.88		
Exchange Rate	4.2	Local currency/US \$	

## PSD, Poultry, Meat, Turkey

PSD Table						
Country	Poland					
Commodity	Poultry, Meat, Turkey				(1000 MT)(MIL HEAD)	
	Revised	2000	Preliminary	2001	Forecast	2002

	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	0	4	0	4	0	10
Production	85	85	87	105	0	115
Whole, Imports	0	0	0	0	0	0
Parts, Imports	6	6	7	5	0	5
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	6	6	7	5	0	5
TOTAL SUPPLY	91	95	94	114	0	130
Whole, Exports	0	0	0	0	0	0
Parts, Exports	14	9	15	9	0	8
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	14	9	15	9	0	8
Human Consumption	77	82	79	95	0	110
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	77	82	79	95	0	110
TOTAL Use	91	91	94	104	0	118
Ending Stocks	0	4	0	10	0	12
TOTAL DISTRIBUTION	91	95	94	114	0	130
Calendar Yr. Imp. from U.S.	2	2	2	2	0	2

## Import Trade Matrix, Meat, Turkey

Import Trade Matrix			
Country	Poland		
Commodity	Poultry, Meat, Turkey		
Time period	Jan-Dec	Units:	tons

Imports for:	1999		2000
U.S.	1140	U.S.	2049
Others		Others	
Hungary	2268	Hungary	499
Canada	874	Canada	1215
Italy	80	Italy	310
Germany	40	Germany	100
France	571	France	659
The Netherlands	63	The Netherlands	155
Great Britain	77	Great Britain	696
Belgium	14	Belgium	100
Denmark	27	Denmark	20
		Byelorussia	19
Total for Others	4014		3773
Others not Listed	42		0
Grand Total	5196		5822

## Export Trade Matrix, Meat, Turkey

Export Trade Matrix			
Country	Poland		
Commodity	Poultry, Meat, Turkey		
Time period	Jan-Dec	Units:	tons
Exports for:	1999		2000

U.S.		U.S.	
Others		Others	
Russia	9309	Russia	2319
Belarus	1175	Belarus	1185
Germany	1198	Germany	3979
Italy	302	Italy	906
Ukraine	145	Ukraine	28
Estonia	116	Estonia	30
Great Britain	92	Great Britain	217
Slovak Republic	60	Slovak Republic	57
Moldavia	59	Switzerland	111
France	40	Austria	138
Total for Others	12496		8970
Others not Listed	189		414
Grand Total	12685		9384

PSD, Poultry, Eggs

PSD Table						
Country	Poland					
Commodity	Poultry, Eggs				(MIL HEAD)(MIL PCS)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Layers	55	55	56	56	0	57

Beginning Stocks	120	167	100	165	100	182
Production	7600	7750	7700	7900	0	8000
Hatch Eggs, Imports	40	40	40	40	0	40
Shell Eggs, Imports	60	29	60	30	0	30
Other Imports	0	0	0	0	0	0
Intra EC Imports	0	0	0	0	0	0
TOTAL Imports	100	69	100	70	0	70
TOTAL SUPPLY	7820	7986	7900	8135	100	8252
Hatch Eggs, Exports	0	0	0	0	0	0
Shell Eggs, Exports	30	21	30	20	0	20
Other Exports	0	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
TOTAL Exports	30	21	30	20	0	20
Hatch Eggs, Consumption	410	425	420	433	0	440
Shell Eggs, Human	6955	7050	7050	7200	0	7300
Shell Eggs, OT Use/Loss	25	25	0	0	0	0
Other Dom. Consumption	300	300	300	300	0	300
Total Dom. Consumption	7690	7800	7770	7933	0	8040
TOTAL Use	7720	7821	7800	7953	0	8060
Ending Stocks	100	165	100	182	0	192
TOTAL DISTRIBUTION	7820	7986	7900	8135	0	8252
Calendar Yr. Imp. from U.S.	2	0	2	0	0	0

## Import Trade Matrix, Eggs

Import Trade Matrix			
Country	Poland		
Commodity	Poultry, Eggs		
Time period	Jan-Dec	Units:	1,000 pieces
Imports for:	1999		2000
U.S.	1080	U.S.	217
Others		Others	
Czech Republic	10422	Czech Republic	12060

France	8640	France	7734
Slovak Republic	1314	Slovak Republic	563
Denmark	1944	Denmark	2106
The Netherlands	15264	The Netherlands	16830
Canada	252	Canada	307
Hungary	180	Latvia	5053
India	34560	India	17337
Russia	2016	Austria	4277
Belgium	6624	Israel	259
Total for Others	81216		66526
Others not Listed	2124		2262
Grand Total	84420		69005

## Export Trade Matrix, Eggs

Export Trade Matrix			
Country	Poland		
Commodity	Poultry, Eggs		
Time period	Jan-Dec	Units:	1,000 pieces
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Belgium	5400	Czech Republic	13084
Switzerland	4950	Switzerland	3013

Germany	4914	Bahama	856
Latvia	4428	Latvia	321
The Netherlands	3168	Yugoslavia	188
Lithuania	2952	Lithuania	301
Argentina	1584	Liberia	75
Romania	486	Hungary	47
Slovak Republic	504	Slovak Republic	2101
Sweden	360	Norway	28
Total for Others	28746		20014
Others not Listed	3168		989
Grand Total	31914		21003

## Retail Prices for Table Eggs

Prices Table			
Country	Poland		
Commodity	Poultry, Eggs		
Prices in	zlotys	per uom	100 pieces
Year	2000	2001	% Change
Jan	34	36	5.88%
Feb	34	36	5.88%
Mar	33	36	9.09%
Apr	33	36	9.09%

May	32	35	9.38%
Jun	31		
Jul	31		
Aug	33		
Sep	34		
Oct	35		
Nov	35		
Dec	36		
Exchange Rate	4.2	Local currency/US \$	

Average Meat Consumption  
(kilograms per capita )

	Pork	Beef	Poultry
1997	35.4	8.3	12.4
1998	37.6	8.1	13.1
1999	39.6	7.8	13.9
2000	37.8	7.3	14.3
2001	35.5	6.0	15.8